

TaiRox Productivity Tools - Extended PO Entry User Guide

Extended PO Entry - Summary

[SmartFinder \(Purchase Orders\)](#) Finds purchase orders quickly for a vendor.

[SmartFinder \(Vendors\)](#) Find a vendor quickly from a name, description, phone number or an address.

[SmartFinder \(Items\)](#) Find an item quickly from partial words.

[Quantities Display](#) Show item quantities at the bottom of the standard PO entry window - the same item quantities that are displayed in the Sage 300 Order Entry module.

[Item Quantities](#) Display quantities available at other locations or in other companies while entering a purchase order.

[Drop Ship](#) Drop ship dozens of purchase order detail lines in a single operation.

[Purchase from History](#) Create a new purchase orders for a vendor based on what has been previously purchased from that vendor.

[Quick PJC Entry](#) Default newly inserted lines to have the same Contract, Project and Category selections as the previously entered line.

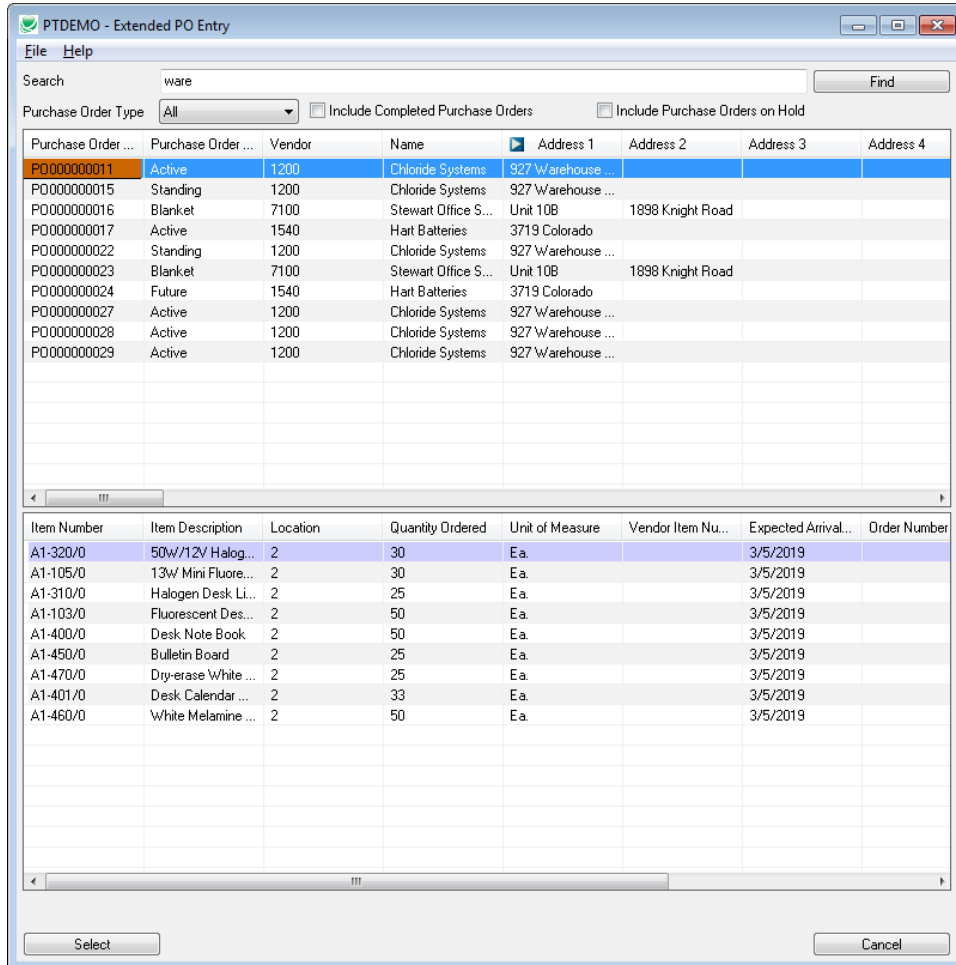
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SmartFinder (Purchase Orders)

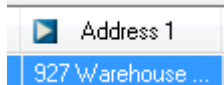
The SmartFinder is launched from the PO Number button.

Searching: Enter a few word fragments in the entry field and multiple tables will be searched. Many fields will be searched simultaneously. All of the word fragments must be present in one of the fields being searched.

Display: The top grid displays matches in the matching purchase orders. The bottom grid displays the details of the purchase order highlighted in the top grid.



Google Maps is launched with the selected address when you click on the right-arrow icon:



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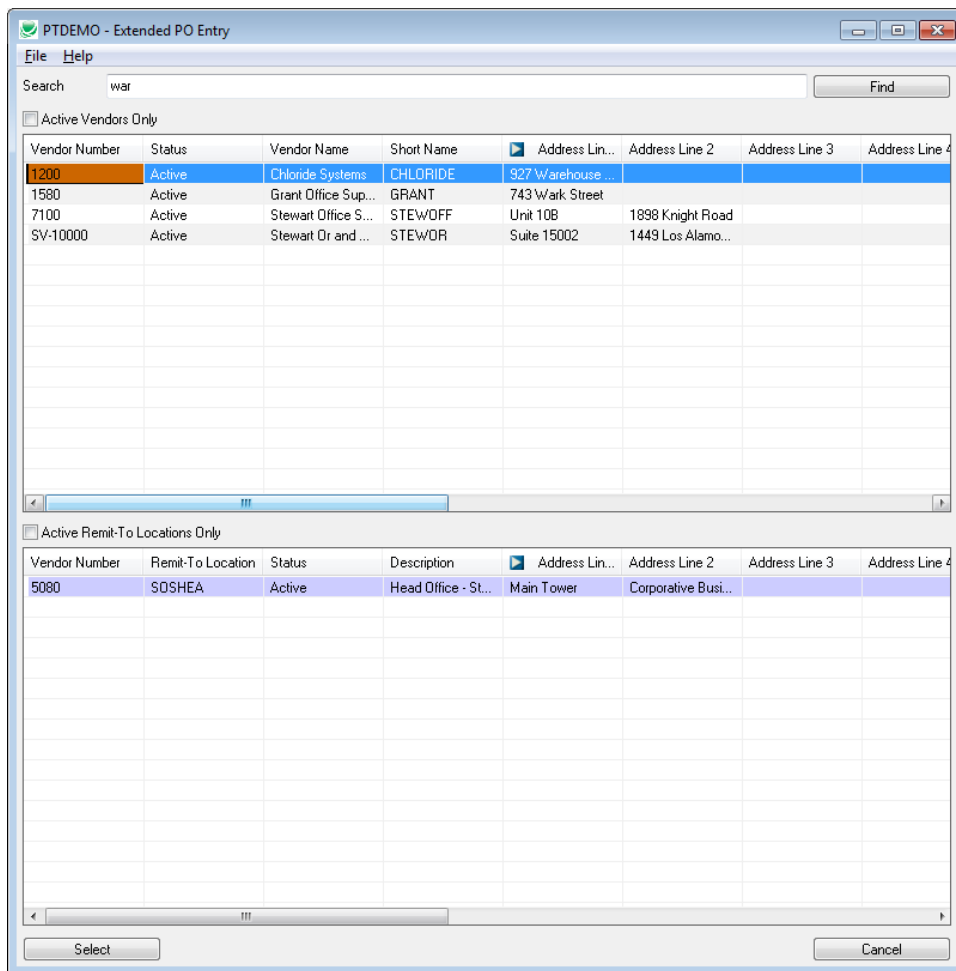
SmartFinder (Vendors)

The SmartFinder is launched from the Vendor Number button.

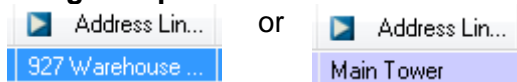
Searching: Enter a few word fragments in the entry field and the vendor and remit-to location tables will be searched. Many fields will be searched simultaneously. All of the word fragments must be present in one of the fields being searched.

Display: The top grid displays matches in the vendor table. The bottom grid displays matches in the remit-to location table.

Selection: Selecting from the top grid will enter the vendor number into the standard form. Selecting from the bottom grid will enter both the vendor number and the remit-to location into the standard form.



Google Maps is launched with the selected address when you click on the right-arrow icon:



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SmartFinder (Items)

The SmartFinder is launched from the Item Finder button.

Searching: Enter a few word fragments in the entry field and the items table will be searched. Many fields will be searched simultaneously. All of the word fragments must be present in one of the fields being searched.

Display: When you click on a row in the top grid, the bottom grid will display all of the vendor item numbers that are in use by that item.

Selection: Selecting from the top grid will enter the item number into the standard form. Selecting from the bottom grid will enter both the item number and the vendor item number into the standard form.

Item Number	Description	Qty. Available	Qty. Available (All)	Status	Comment 1
A1-103/0	Fluorescent Desk Lamp	0	657	Active	Comes with stand and mounting bracket for v.
A1-310/0	Halogen Desk Light	0	443	Active	Desk lamp with adjustable reflector and arm.

Vendor Item Number	Vendor Type	Vendor Name	Vendor Contact	Cost Unit
a11030	Vendor 1	Grant Office Supplies		Ea.

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Quantities Display

Item quantities for the selected location and item are shown at the bottom of the standard PO entry window - the same item quantities that are displayed in the Sage 300 Order Entry module. Drill-down links are provided. Note that this is for the single location displayed in the grid. The Item Quantities feature enables the display of item quantities for multiple locations.

The screenshot shows the PTDEMO - Extended PO Entry window. At the top, there are fields for PO Number (PO000000003), Vendor Number (2300), and Vendor (Tomington Ltd.). Below this are tabs for Order, Taxes, Optional Fields, Rates, and Totals. The Order tab is active, showing fields for Template, PO Date (01/08/2019), PO Type (Active), Ship-To Location, Bill-To Location, Vendor Acct. Set (USA), and Description. A grid below these fields lists three items:

Lin...	Completed	Item Number	Item Description	Location	Drop-Ship	Quantity Ordered	Unit of Measure	Unit Cost	Extended C
1	No	A1-103/0	Fluorescent Desk Lamp	1	No	100	Ea.	22.020292	2,202
2	No	A1-310/0	Halogen Desk Light	1	No	100	Ea.	27.598010	2,759
3	No	A1-310/0	Halogen Desk Light	4	No	500	Ea.	26.993006	13,496

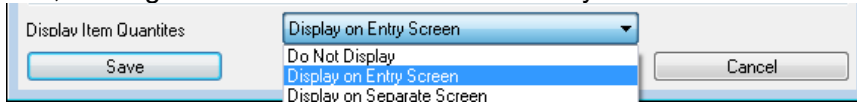
Below the grid are buttons for Item/Tax..., Calc. Taxes, Consolidate, Item Finder..., Drop Ship..., and Order Subtotal (18,458.33 USD). At the bottom, there are buttons for Post, Delete, History..., Purchase From History..., and Close. A red box highlights a summary table at the bottom of the window:

	Qty. On Hand	Qty. On Sales Order	Qty. On Purchase Order	Qty. Committed	Qty. Available
Location 1 (Ea.)	137.0000	6.0000	250.0000	0.0000	137.0000
All Locations (Ea.)	657.0000	26.0000	426.0000	0.0000	657.0000

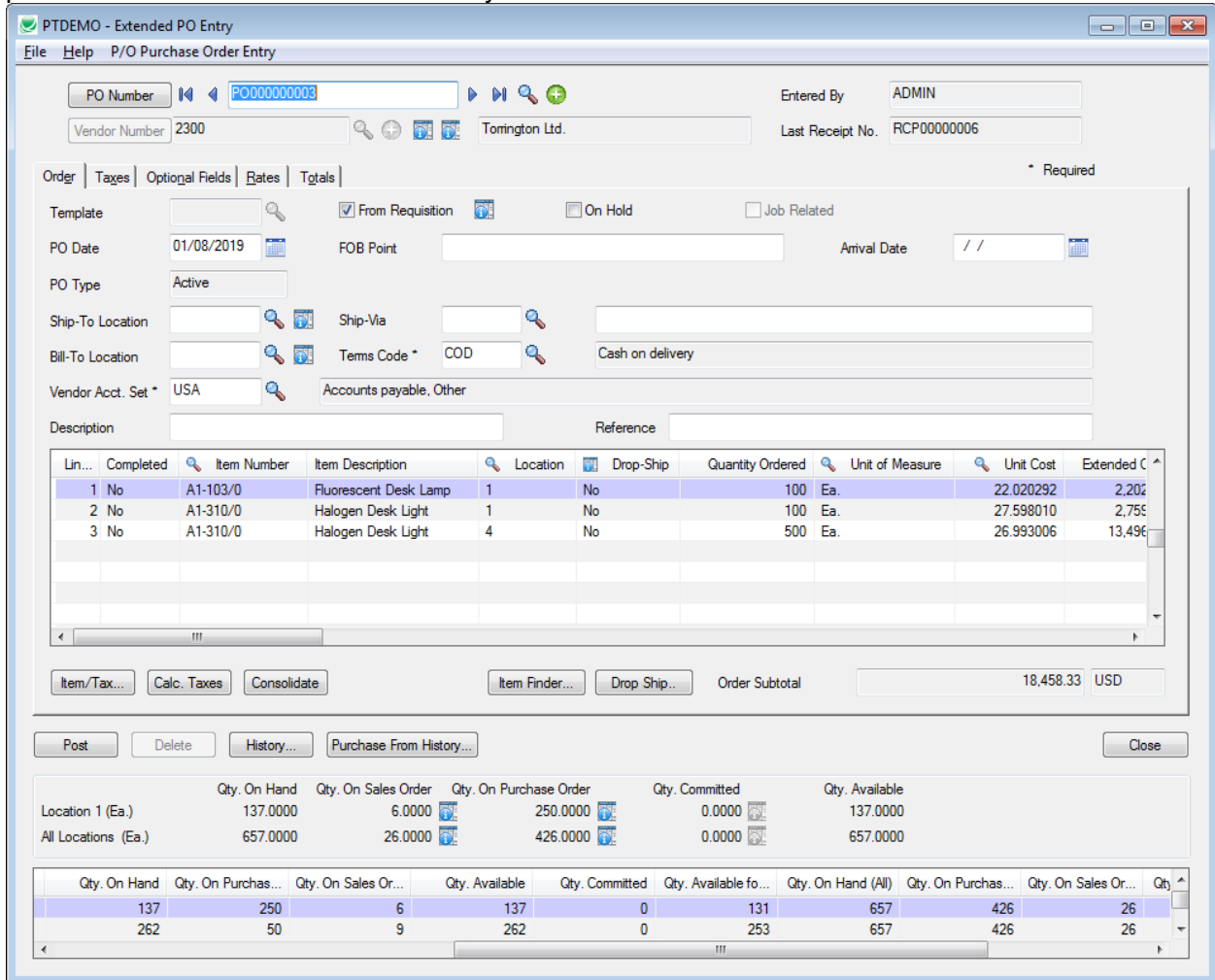
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Item Quantities

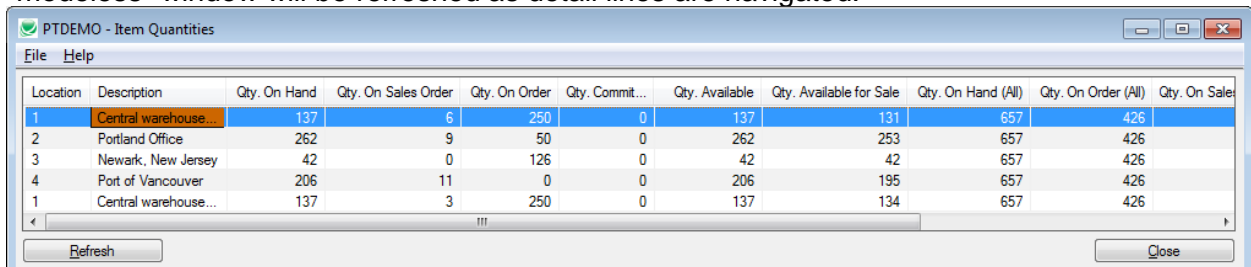
The Item Quantities feature will display quantities available at other locations, including in other companies while entering an order. Three settings control this feature and are available from the File, Settings menu in the Extended PO Entry window:



The Display on Entry Screen choice will cause a scrolling area showing 2 lines at a time to be placed at the bottom of the Order Entry window as shown here:



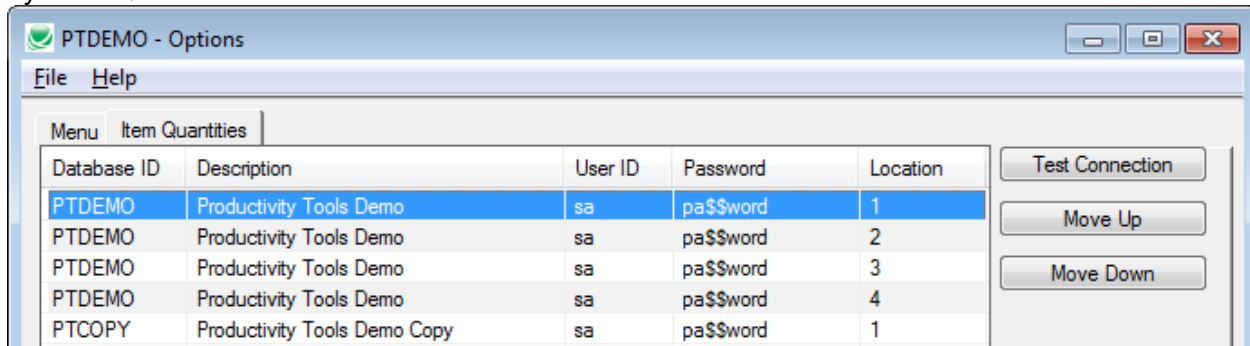
The Display on Separate Screen choice will show quantities in a separate window. This "modeless" window will be refreshed as detail lines are navigated.



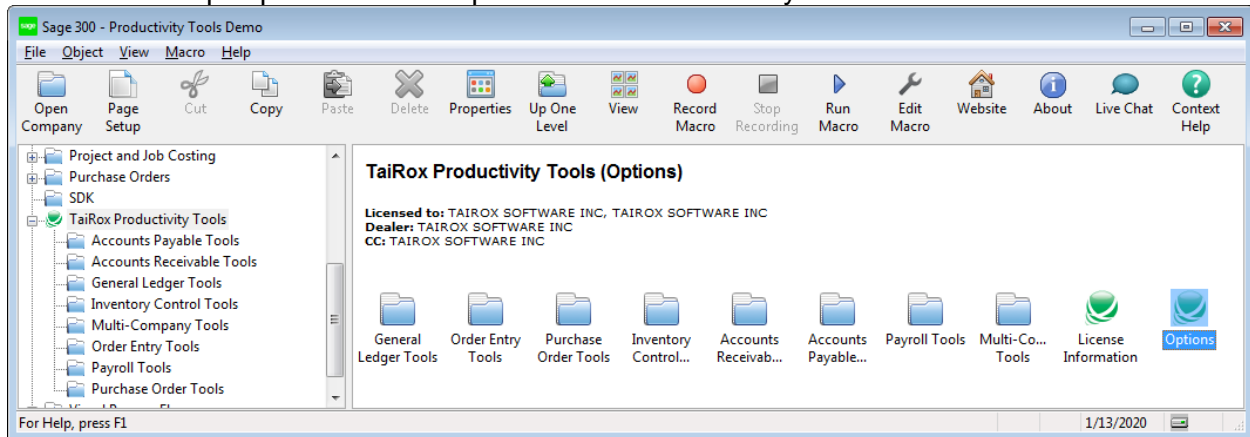
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Item Quantities

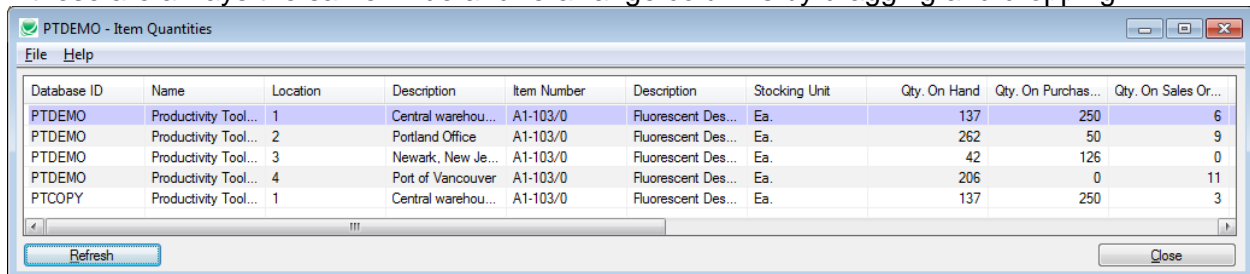
An administrator will set up the Sage 300 company databases and locations that are displayed by Item Quantities:



Access to set up is provided from top level of the Productivity Tools menu:



The default Item Quantity display will show many columns that will be hidden in most situations. For example, the Database ID and Name would be hidden if all locations are in the same Sage 300 company. For example, the Item Description and Stocking Unit for an item would be hidden if these are always the same. Hide and re-arrange columns by dragging and dropping.



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Purchase from History

Purchase from History functionality provides a convenient means to create new purchase orders for a vendor based on what has been previously purchased from that vendor. Use of Purchase from History tends to consolidate multiple orders into a single larger order, resulting in lower shipping costs, increased discounts and other operational efficiencies.

The Purchase from History pop up window is shown here. The Purchase Orders tab allows you to apply selection criteria and then press the Load button to request previous purchase orders. The Purchase History tab is similar, selecting on item criteria rather than order criteria. We'll trace through a typical sequence for the Purchase Orders tab.

The screenshot shows a software window titled "SAMLTD - TaiRox Extended PO Entry". It has a menu bar with "File" and "Help". Below the menu bar are two tabs: "Purchase Orders" (selected) and "Purchase History".

The "Purchase Orders" tab contains the following elements:

- Order Range:** A section with "Select Orders By" and "From" labels. Below "Select Orders By" are three dropdown menus, each currently set to "(None)". To the right of these is a "To" label and an "Additional Criteria..." button.
- Table 1:** A table with columns: Purchase Order Number, Purchase Order Date, Bill-To Location, Ship-To Location, Description, and Reference. The table is currently empty.
- Table 2:** A table with columns: Line Number, Include, Item Number, Item Description, Location, Order UOM, Quantity Ordered, Qty Ordered, and Unit Cost. The table is currently empty.
- Summary Table:** A table with columns: Location, Qty. on Hand, Qty. on Sales Order, Qty. on Purchase Order, Qty Committed, and Qty. Available. The data is as follows:

Location	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty Committed	Qty. Available
Location	0	0	0	0	0
All Locations	0	0	0	0	0
- Buttons:** At the bottom, there are buttons for "Load", "Select All", "Select None", "Order", and "Close".

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Purchase from History

Historical purchase orders will be displayed. Select an order line to see what items comprised that purchase order:

The screenshot shows the 'SAMLTD - TaiRox Extended PO Entry' application window. The 'Purchase History' tab is active. The 'Order Range' section has three dropdown menus set to '(None)' and an 'Additional Criteria...' button. Below this is a table of purchase orders:

Purchase Order Number	Purchase Order Date	Bill-To Location	Ship-To Location	Description	Reference
PO000000028	7/1/2020	1	1		
PO000000027	7/1/2020	1	1		
PO000000022	6/23/2020	1	1	Standing order f...	Jun 2010 PO
PO000000015	1/23/2020	1	1	Standing order f...	Jan 2010 PO
PO000000011	3/4/2019	2	2	To refill inventory	Mar 2009 PO

Below the purchase orders table is a table showing the details for the selected order line (Line 1):

Line Number	Include	Item Number	Item Description	Location	Order UOM	Quantity Ordered	Qty Ordered	Unit Cost
1	No	A1-103/0	Fluorescent Desk Lamp	1	Ea.	15		19.99
2	No	A1-105/0	13w Mini Fluorescent Bulb	4	Ea.	20		3.35

At the bottom of the window is a summary table for inventory levels:

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty Committed	Qty. Available
Location 1 (Ea.)	137	0	150	0	137
All Locations (Ea.)	657	0	276	0	657

The interface also includes buttons for 'Load', 'Select All', 'Select None', 'Order', and 'Close'.

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Purchase from History

Clicking on the Select All button will select all items in the previous purchase order (the Include column now displays Yes).

The screenshot shows the 'SAMLTD - TaiRox Extended PO Entry' application window. The 'Purchase History' tab is active. The 'Order Range' section has three dropdown menus, all set to '(None)', and an 'Additional Criteria...' button. Below this is a table of purchase orders:

Purchase Order Number	Purchase Order Date	Bill-To Location	Ship-To Location	Description	Reference
PO000000028	7/1/2020	1	1		
PO000000027	7/1/2020	1	1		
PO000000022	6/23/2020	1	1	Standing order f...	Jun 2010 PO
PO000000015	1/23/2020	1	1	Standing order f...	Jan 2010 PO
PO000000011	3/4/2019	2	2	To refill inventory	Mar 2009 PO

Below the purchase orders table is a detailed view of the selected order items:

Line Number	Include	Item Number	Item Description	Location	Order UOM	Quantity Ordered	Qty Ordered	Unit Cost
1	Yes	A1-103/0	Fluorescent Desk Lamp	1	Ea.	15		19.99
2	Yes	A1-105/0	13w Mini Fluorescent Bulb	4	Ea.	20		3.35

At the bottom of the window, there is a summary table for inventory and order status:

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty Committed	Qty. Available
Location 1 (Ea.)	0	0	0	0	0
All Locations (Ea.)	0	0	0	0	0

The bottom of the window contains several buttons: 'Load', 'Select All', 'Select None', 'Order', and 'Close'.

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Purchase from History

The quantities to be copied from the previous purchase order can be edited. Here the 15 desk lamps in the original purchase order is changed to 20 and the 20 Mini Florescent bulbs will be changed to 10. When edits are complete, press the Order button.

The screenshot shows the 'SAMLTD - TaiRox Extended PO Entry' window. It has a menu bar with 'File' and 'Help'. Below the menu bar are tabs for 'Purchase Orders' and 'Purchase History'. The 'Purchase History' tab is active. There is an 'Order Range' section with three dropdown menus for 'Select Orders By', 'From', and 'To', all set to '(None)'. An 'Additional Criteria...' button is to the right. Below this is a table of purchase orders:

Purchase Order Number	Purchase Order Date	Bill-To Location	Ship-To Location	Description	Reference
PO000000028	7/1/2020	1	1		
PO000000027	7/1/2020	1	1		
PO000000022	6/23/2020	1	1	Standing order f...	Jun 2010 PO
PO000000015	1/23/2020	1	1	Standing order f...	Jan 2010 PO
PO000000011	3/4/2019	2	2	To refill inventory	Mar 2009 PO

Below the purchase order table is a table of line items:

Line Number	Include	Item Number	Item Description	Location	Order UOM	Quantity Ordered	Qty Ordered	Unit Cost
1	Yes	A1-103/0	Fluorescent Desk Lamp	1	Ea.	15	20	19.99
2	Yes	A1-105/0	13w Mini Florescent Bulb	4	Ea.	20	10	3.35

At the bottom of the window is a summary table:

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty Committed	Qty. Available
Location 1 (Ea.)	137	0	150	0	137
All Locations (Ea.)	657	0	276	0	657

Buttons at the bottom include 'Load', 'Select All', 'Select None', 'Order', and 'Close'.

A completion message will appear and the purchase order entry form will be populated with line items from the historical purchase order.

Note Re Descriptions, Comments and Instructions: Some clients will want item descriptions taken from the historical purchase order, so that historical POS can be taken as a "template" for a purchase order. Some clients will want item descriptions to be taken from the inventory item master. Purchase from History will support either option, controlled by a setting accessed from the Purchase from History UI form (File, Settings). Similarly, some clients will want comments and/or instructions copied from the historical PO and some will not want them to be copied.

The screenshot shows the 'TaiRox Software Inc. - Extended PO Entry Settings' dialog box. It has three checkboxes, all of which are unchecked:

- Use description from selected line for detail description
- Include comments for each selected line
- Include instructions for each selected line

Buttons at the bottom include 'Save' and 'Cancel'.

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Purchase from History

The Purchase History tab allows a similar sequence of operations – selection, editing of quantities and copying to the purchase order.

Item Range

Select Items By: (None) From: (None) To: (None) Additional Criteria...

Include	Item Number	Item Description	Invoice Number	Transaction Date	Location	Unit of Measure	Total Quantity	Qty Ordered
No	A1-103/0	Fluorescent Des...	CC485-2281032	3/9/2019	2	Ea.	50	
No	A1-103/0	Fluorescent Des...	CC485-2287453	4/13/2019	1	Ea.	30	
No	A1-103/0	Fluorescent Des...	CC485-2281175	7/3/2019	4	Ea.	36	
No	A1-103/0	Fluorescent Des...	CC485-2281179	7/3/2019	3	Ea.	10	
No	A1-103/0	Fluorescent Des...	CC485-2281233	10/6/2019	3	Ea.	30	
No	A1-103/0	Fluorescent Des...	CC485-2281245	10/6/2019	4	Ea.	24	
No	A1-103/0	Fluorescent Des...	CC485-2285735	12/7/2019	4	Ea.	36	
No	A1-103/0	Fluorescent Des...	CC485-2285330	12/7/2019	3	Ea.	10	
No	A1-103/0	Fluorescent Des...	IN120111	5/5/2020	1	Ea.	10	
No	A1-103/0	Fluorescent Des...	IN120121	5/10/2020	1	Ea.	15	
No	A1-103/0	Fluorescent Des...	IN120131	6/23/2020	1	Ea.	15	
No	A1-103/0	Fluorescent Des...	IN120141	6/30/2020	1	Ea.	12	
No	A1-103/0	Fluorescent Des...	IN120151	6/30/2020	1	Ea.	15	

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty Committed	Qty. Available
Location 2 (Ea.)	262	0	0	0	262
All Locations (Ea.)	657	0	276	0	657

Buttons: Load, Select All, Select None, Order, Close

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Quick PJC Entry

When entering Sage 300 Project and Job Costing entries in a PO and when multiple lines use the same selections for Contract, Project and Category, Extended Order Entry will default inserted lines to the previous entry's selections to speed up data entry. The following form shows how the order form appears immediately after pressing the Insert key:

PTDEMO - Extended PO Entry

File Help P/O Purchase Order Entry

PO Number NEW

Vendor Number 1200 Entered By

Chloride Systems Last Receipt No.

Order Taxes Optional Fields Rates Totals * Required

Template From Requisition On Hold Job Related

PO Date 01/13/2020 FOB Point Arrival Date

PO Type Active

Ship-To Location Ship-Via

Bill-To Location Terms Code * DUETBL Due by Invoice Date

Vendor Acct. Set * USA Accounts payable, Other

Description Reference

Lin...	Completed	Contract	Project	Category	Cost Class	Item Number	Item Description	Location
1	No	120-1200-10	1002	PRCHWHTBRD	Material	A1-460/0	White Melamine Board	1
2	No	120-1200-10	1002	PRCHWHTBRD	Material	A1-460/0	White Melamine Board	1

Item/Tax... Calc. Taxes Consolidate Item Finder... Drop Ship... Order Subtotal 53.19 USD

Post Delete History... Purchase From History... Close

	Qty. On Hand	Qty. On Sales Order	Qty. On Purchase Order	Qty. Committed	Qty. Available
Location	0.0000	0.0000	0.0000	0.0000	0.0000
All Locations	0.0000	0.0000	0.0000	0.0000	0.0000

Database ID	Name	Location	Description	Item Number	Description	Stocking Unit	Qty. On Hand	Qty. On Purchas...	Qty. On
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